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World Production and Trade

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 46-85

Nov. 14, 1985

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

TRADE NOTES

Shipping through the Welland Canal between Lakes Ontario and Erie resumed on November 7 after the collapse of a lock wall on October 14 forced the closing of the canal for nearly a month during the peak shipping season. Seaway officials estimate that it will take about a week to clear the backlog of approximately 130 ships waiting to pass through the lock. The temporary closing of the canal is not believed to have seriously affected total exports from either Canada or the United States. Nearly half of all exported Canadian grain (10-15 million tons annually) moves through the St. Lawrence Seaway. In October and November 1984 Canada moved nearly 3 million tons of grain through the Seaway, while the United States moved only 100,000 tons.

In an effort to improve its balance of payments and trade deficit, GREECE is now requiring that import permits for many agricultural and nonagricultural products be accompanied by either a 40 or 80 percent deposit of the C.I.F. value. The deposit is to be held six months, interest free, for use by the Greek government. Tobacco, cotton, and seed products were included among the items. The import deposit was set at 80 percent for tobacco and 40 percent for cotton and seed products. Although the final impact is unclear and schedule changes are likely, retail prices of finished goods using these imported commodities will probably rise.

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GRAIN AND FEED

Drought-damaged forage crops could cause SPAIN to curtail its subsidized barley export program and U.S. feed grain exports could rise according to the U.S. agricultural counselor in Madrid. The drought across most of southern Europe has damaged Spanish forage crops, leading to higher domestic barley prices and stronger internal demand for barley. This substitution of barley for forage in feed rations could reduce Spain's exportable supplies of barley. Spain exported a record 850,000 tons of barley between July and September, and had been planning to export an additional 1 million tons during 1985/86 (July-June) marketing year. This year is the first year since 1977/78 that Spain has exported over 100,000 tons of barley.

SPAIN's total grain production in 1985/86 is estimated at a record 20.0 million tons, slightly above last year's bumper crop and 30 percent above the recent five-year average, according to the U.S. agricultural counselor in Madrid. Wheat production is put at 5.3 million tons, 8 percent below last year's bumper harvest, but 11 percent above the recent five-year average. Coarse grain production is estimated at a record 14.3 million tons, 4 percent above last year and 40 percent above the recent five-year average. Barley production is estimated at 10.0 million tons, the same as last year, while corn production is estimated at a record 3.2 million tons, 28 percent above last year and 44 percent above the recent five-year average. The average corn yield is estimated at a record 6.2 tons per hectare, 9 percent above the previous high of last year. Other coarse grains including oats, rye and sorghum are estimated at a combined 1.1 million tons, slightly below last year, while rice production (milled-basis) is estimated at a record 330,000 tons, 8 percent above last year.

OILSEEDS AND PRODUCTS

KOREA has been switching its soybean meal purchases from the United States and South America to China, according to the U.S. agricultural counselor in Seoul. Chinese soybean meal exports to Korea increased to 52,900 tons during January-July, up from 9,800 tons during the same period of 1984. At the same time, Korean soybean meal imports from the United States, Brazil, and Argentina dropped to zero. Korea's soybean meal imports in the same period of 1984 were 39,900 tons from the United States, 24,400 tons from Brazil and 29,100 tons from Argentina. Low prices for Chinese soybean meal are thought to be the reason that Korea is changing its sources for imports.

DAIRY, LIVESTOCK AND POULTRY

BAHRAIN's Ministry of Commerce and Agriculture has formally banned imports from the French company Unaco, one of the largest food exporters to that market, according to the U.S. agricultural trade office in Manama. The ban is based on alleged violations of Bahraini health requirements. Among the items being detained is frozen chicken with 1983 expiration dates. The ban on this supplier opens the way for other exporters, particularly Brazil and Hungary, but also including the United States.

The Government of Bahrain has not yet advised other member states of the Gulf Cooperation Council of the action, but that option is still under consideration. Potentially, such an action could result in significant losses for France in livestock product sales (particularly poultry) in such major markets as Saudi Arabia, Kuwait and the United Arab Emirates. These countries account for nearly half of world poultry meat imports, and poultry trade with them has been dominated by France for the last three years.

While the volume of YUGOSLAVIA's exports of live cattle, meat and meat products for the first six months of 1985 was up compared to the same period in 1984, depressed international meat prices kept total returns from reaching planned levels, according to the U.S. agricultural attache in Belgrade. Failure to reach planned export levels is attributed to severe subsidized competition from the European Community and other East European countries.

Total export earnings of \$182 million in January-June 1985 were about the same as for the same period in 1984. However, exports to hard currency buyers fell by 3 percent and exports of canned hams to the United States fell by 32 percent. These factors, combined with reduced domestic consumer income and more than adequate stocks of frozen meat, are responsible for a decline in livestock slaughter. If this trend continues, it will likely have a negative impact on Yugoslavia's demand for feed grains.

The EUROPEAN COMMUNITY Commission recently proposed that the Community compensate EC producers willing to give up dairying permanently, according to the U.S. agricultural counselor to the EC Mission in Brussels. This would be in addition to the current program of individual member states buying producers' quotas and reallocating them to producers with special needs. The Commission expects to buy quotas totaling 3 million tons under the new scheme.

Compensation of 6 European Currency Units (ECU's) per 100 kilograms of milk or milk equivalent per year would be paid for seven years to producers willing to give up dairying as of Jan. 1, 1987. Member states may exclude farms with less than six cows and may contribute to the financing of the program. Total Community expenditures for the new "outgoers" scheme are expected to be 1,260 million ECU's (180 million ECU's per year) plus additional expenditures in the beef sector due to increased cow slaughter. However, savings realized from reduced expenditures for stocking and sale of butter are expected to be as high as 5,880 million ECU's (840 million ECU's per year). All things considered, the proposal is expected to reduce EC budget outlays.

The EUROPEAN COMMUNITY has raised egg and poultry meat export subsidies by 33 and 38 percent, respectively, effective November 1, according to the U.S. agricultural counselor to the EC Mission in Brussels. Subsidies on poultry meat have risen from 130 ECU's to 180 ECU's per ton and on eggs in the shell from 150 ECU's to 200 ECU's per ton. The increases were the result of pressure from member states whose exports of these products were lagging.

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World trade in poultry products is continuing to fall due to rising self-sufficiency among importing countries. As a result, the United States' major competitors, the European Community and Brazil, have lowered their prices. The United States will eventually be shut completely out of the remaining poultry markets if subsidized competitor export prices continue to decline.

WORLD milk production is expected to total 417 million tons in 1985, about 1 percent above 1984. Strong growth in the United States, India, China and the USSR is expected to more than offset a decline in the European Community. Preliminary forecasts for 1986 indicate global milk production may increase another 1 percent largely based on expected further increases of 3 percent in the United States; 2 percent in the USSR; and 10 percent in India. Milk production in the EC-10 is expected to be down somewhat from 1985.

Cow numbers and milk production in selected countries are shown below:

	Cow Numbers			Milk Production		
	1984	1985 1/	1986 1/	1984	1985 1/	1986 1/
	-----Million Head-----			-----Million Tons-----		
United States	10.8	11.0	11.0	61.4	65.0	67.1
Canada	1.7	1.7	1.7	8.2	8.2	8.1
EC-10	25.5	24.5	23.8	109.1	106.2	105.3
Japan	1.1	1.1	1.1	7.2	7.4	7.5
USSR	43.9	43.6	43.4	97.9	100.0	102.0
Australia 2/	1.8	1.8	1.8	6.1	6.2	6.2
New Zealand 3/	2.1	2.2	2.2	7.7	7.8	7.8
Total of 37 Countries	163.8	162.4	162.5	410.4	413.8	418.3
China 4/	0.7	0.9	1.0	2.2	2.8	3.1
Total of 38 Countries	164.5	163.3	163.5	412.6	416.6	422.4

1/ Forecast. 2/ Year ending June 30. 3/Year ending May 31. 4/ Data for cow numbers and milk production in China are included for the first time.

Milk production in the UNITED STATES this year is forecast to be 6 percent above 1984 when the milk diversion program contributed to a production decline. In 1986, the average number of cows milked is expected to be about the same as a year earlier, but plentiful supplies of concentrates and continued management improvements make another productivity increase likely.

Cow numbers and milk production in CANADA are largely unchanged in 1985. Both are expected to decline in 1986 because the quota for industrial production was cut for 1985/86 (August-July) and the penalty for over-quota deliveries was increased.

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Milk production in the EUROPEAN COMMUNITY-10 in 1985 is down nearly 3 percent as a result of the quota program. The largest decline in percentage terms is taking place in the United Kingdom, where for the second year in succession, unfavorable weather adversely affected forage growth which caused production to fall below quota. Both the Netherlands and Germany are expected to cut production about 4 percent in 1985 as they attempt to stay within their quotas. Due to the quota system, milk cow numbers are down about 1.0 million head for the EC as a whole in 1985. Production in the EC-10 is likely to decline again in 1986 because further production cuts are needed during the first quarter of 1986 to meet the 1985/86 quotas.

Better supplies of both forage and grain during the second half of 1985 should allow the SOVIET UNION to increase its milk production about 2 percent. During the early months of 1985, milk production was slightly below year-earlier levels due to harsh weather during winter and early spring. However, summer and fall weather were favorable for forage production. Despite better feed supplies this fall cow numbers have not started to expand, indicating that Soviet authorities want future increases in milk production to come from increased productivity rather than from herd expansion.

Milk production in CHINA (included for the first time in this report) in 1985 is expected to reach 2.8 million tons, 25 percent above 1984. This continues a pattern of rapid growth in both cow numbers and milk production that started in the late 1970's. Most of China's growth is the result of expansion by individuals with less than 10 cows. Only modest production increases are reported for China's larger, more modern state farms.

AUSTRALIA's milk output was up 2 percent in 1984/85 as pasture conditions were favorable. Lower profitability levels for milk production are expected to keep 1985/86 cow numbers and milk production at the 1984/85 level. NEW ZEALAND's milk production was up 1 percent in 1984/85 as a result of an increase in cow numbers. A further increase in cow numbers and favorable weather at the start of New Zealand's 1985/86 season indicate another milk production increase is likely. The drought conditions reported recently in both Australia and New Zealand are largely outside the major dairy regions and, as a result, have had minimal impact on milk production in either country.

GLOBAL butter production is expected to decline only about 1 percent in 1985 despite an 8 percent decline in the EC. Much of the EC decline is being offset by increases in the United States and the USSR due to larger milk production. For 1986 gains in milk production will again tend to spur expansion of butter production in the United States and USSR. EC butter production is forecast to decline about 3 percent in 1986 as cheese production takes a bigger share of available milk supplies. New Zealand's butter production is forecast to decline as efforts are made to reduce stocks.

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Production of dairy products in selected countries is as follows in 1,000 metric tons:

	Butter			Cheese			Nonfat Dry Milk		
	1984	1985 1/	1986 1/	1984	1985 1/ 1,000 Tons	1986 1/	1984	1985 1/	1986
United States	500	563	620	2,120	2,295	2,410	527	640	750
Canada	108	102	96	193	205	210	129	121	113
EC-10	2,108	1,944	1,895	3,782	3,859	3,888	2,089	1,875	1,821
Japan	78	85	88	19	20	20	155	175	180
USSR	1,588	1,620	1,660	782	805	835	440	480	520
Australia 2/	111	117	116	161	160	164	124	151	140
New Zealand 3/	287	295	275	110	115	120	248	242	230
Total 4/	6,767	6,692	6,723	9,266	9,580	9,813	4,296	4,243	4,308

1/ Forecast. 2/ Year ending June 30. 3/Year ending May 31. 4/ Total of 35 countries for butter, 34 countries for cheese, and 30 countries for NDM.

Global cheese production is forecast to expand 3 percent in 1985 and an additional 2 percent in 1986. Much of the increase in both years will be in the United States where cheese production is expected to expand 175,000 tons in 1985 and 115,000 tons in 1986. In the EC, the world's largest producer, increased production is largely being absorbed by the domestic market. Cheese output in New Zealand is forecast to increase about 5 percent in 1985 and 1986 as prices have shown some improvement during 1985. Australian cheese production is expected to show little change in either 1985 or 1986 as stocks continue to build.

Global production of nonfat dry milk (NDM) is expected to decline slightly in 1985 as a 10-percent decline in the EC-10 is offset by increases in the United States and the USSR. Production in Australia also is expected to show a large increase. Global production in 1986 is expected to rise 1 to 2 percent as increases in the United States and the USSR more than offset a small decline in the EC.

Casein production is expected to total 230,000 tons in 1985, essentially the same as in 1984. EC production is forecast to increase 8 percent with most of the growth occurring in Ireland where dairy processing plants are attempting to increase the range of products manufactured. Casein output in Australia is expected to fall sharply as export sales of nonfat dry milk have improved. For 1986 global casein production could fall about 5 percent due to a sharp decline predicted for Poland where industrial use of milk is expected to decline significantly as milk production contracts due in part to unprofitable prices.

FRUITS AND NUTS

JAPAN's 1985/86 citrus crop is forecast at 3.45 million tons, up 24 percent from last year's weather-reduced crop, but 9 percent less than the 1983/84 harvest, according to the U.S. agricultural counselor in Tokyo. The 1985/86 tangerine harvest is forecast at 2.9 million tons, of which 2.5 million are satsumas (mandarin oranges). Last season's satsuma harvest totaled 2.0 million tons. Total 1985/86 orange production is forecast at a record large 66,000 tons, up 12 percent from last season.

BRAZIL's 1985 commercial orange crop in the state of Sao Paulo is estimated at a record 8.4 million tons (205 million 40.8-kilogram boxes), down 7 percent from earlier indications (see WR 24-85), but 8 percent above the 1984 harvest, according to the U.S. agricultural officer in Sao Paulo. The decline from the previous estimate is attributed to dry weather from late June through mid-October which reduced fruit size. Despite the decline in prospects for 1985 fruit production, exportable orange juice supplies will not be curtailed because of a higher-than-expected juice yield.

YUGOSLAVIA's Federal Statistical Institute in Belgrade recently released the official 1985/86 production estimates for deciduous fruits and table grapes. Production of apples, plums and table grapes is expected to fall 26, 22 and 27 percent, respectively, below the 1984/85 level. These estimates reflect the extensive damage caused by cool, rainy weather during pollination, and the subsequent summer drought during the crucial sizing period. A 5-percent increase is forecast for pears. Production estimates for 1984/85 and 1985/86 are as follows in 1,000 tons:

	1984/85	1985/86 <u>1/</u>
Apples	584	435
Pears	145	152
Plums	630	493
Table grapes	212	154

1/ Preliminary.

COTTON

THAILAND recently lowered its import duty on raw cotton to about 1.7 cents per pound, eliminating the old duty of 5 percent ad valorem. Although this is welcome news for shippers, the new duty remains considerably higher than the 0.6-cent per pound rate effective prior to October 1984.

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TOBACCO

Unmanufactured tobacco exports by the UNITED STATES during September 1985 totaled 18,960 metric tons valued at \$111.6 million, an increase of 5 percent in volume from September 1984 and up 4.5 percent from a month earlier. Shipments of both flue-cured and several other types increased but burley exports were down slightly. Exports for January-September 1985 were 145,591 tons worth \$922.9 million, up 8 percent in volume and 9 percent in value from the same year-earlier period.

Imports of unmanufactured tobacco for consumption (duty paid) totaled 15,373 tons worth \$42.5 million, up less than 2 percent in volume from September 1984 and down 5 percent in value. January-September imports totaled 145,548 tons worth \$423.5 million, up 1.6 percent in quantity but down 1 percent in value from last year.

For the entire year, exports of unmanufactured tobacco should exceed 260,000 metric tons worth more than \$1.6 billion. With imports stagnant at around 185,000 tons valued at \$550 million, the balance of trade surplus with unmanufactured tobacco should exceed \$1 billion.

KOREA's Office of Monopoly recently announced export and grower prices for six grades of flue-cured and burley tobacco. The median grade grower price for flue-cured is the equivalent of about \$1.20 per pound, compared to a \$1.72 average grower price for flue-cured in the United States. In contrast, Korea's export price for the median grade offered is 87 cents per pound, which amounts to a 27.5 percent subsidy. Korean tobacco is a major competitor of U.S. leaf in Pacific Basin countries and Western Europe. As the government tries to lower stock levels through these export subsidies, U.S. leaf will face even tougher competition in those areas.

COFFEE, TEA AND COCOA

The office of the U.S. agricultural counselor in BRAZIL completed a 10-day field survey ending November 9th, through the major coffee producing states of Minas Gerais, Sao Paulo and Parana. An abnormally dry winter season combined with the late start of the rainy season (which normally begins near the end of August) delayed coffee tree flowering and could cause a sharp drop in coffee production potential for the 1986/87 season. The areas where coffee trees were most severely affected by the drought could also reduce the production of prime quality coffee.

Under normal moisture conditions, coffee trees in Brazil first bloom about mid-September, followed by a second and sometimes third bloom in early October and early November. This year's first bloom produced practically no cherry settings in parts of the affected area because of the defoliation of trees caused by the dry weather. Rainfall amounts ranging from 1-1/2 to 3 inches fell throughout Brazil's coffee region earlier this month, temporarily alleviating dry soil moisture conditions. Since drier conditions returned on November 6, USDA will continue to monitor weather factors in Brazil's coffee producing regions.

SUGAR

World centrifugal sugar production in 1985/86 is forecast at 98 million tons (raw value), 3 percent below the 1984/85 output of 100.6 million tons. World production of sugar from cane is forecast at 60.7 million tons (62 percent of the total) and sugar from beets is forecast at 37.3 million tons. The expected decrease in total sugar production in 1985/86 is primarily due to a 4-percent decline in the production of sugar from cane. Most of the decline is expected to occur in Cuba and Brazil (see WR-44-85).

Regional sugar production estimates are as follows in 1,000 tons (raw basis):

Region	1984/85			1985/86		
	Beet	Cane	Total	Beet	Cane	Total
North America	2,730	6,078	8,808	2,730	6,220	8,950
South America	390	14,318	14,708	360	12,800	13,160
Central America	0	1,792	1,792	0	1,760	1,760
Caribbean	0	9,714	9,714	0	8,500	8,500
European Community	13,581	0	13,581	13,400	0	13,400
Other Western Europe	2,245	12	2,257	1,990	10	2,000
Eastern Europe	5,714	0	5,714	5,690	0	5,690
USSR	8,600	0	8,600	8,900	0	8,900
North Africa	516	1,295	1,811	490	1,280	1,770
Other Africa	0	6,005	6,005	0	6,030	6,030
Middle East	2,196	200	2,396	1,990	200	2,190
Asia ^{1/}	1,620	19,601	21,221	1,750	20,000	21,750
Oceania	0	4,027	4,027	0	3,900	3,900
Total	37,592	63,042	100,634	37,300	60,700	98,000

^{1/} Includes Khandsari sugar in India.

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Selected International Prices

Item	:	Nov. 13, 1985	:	Change from	:	A year
	:		:	previous week	:	ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT		\$ per MT
Wheat:						
Canadian No. 1 CWRS-13.5% 9/		190.50	5.18	+.50		189.00
U.S. No. 2 DNS/NS: 14%....		178.50	4.86	+2.50		175.50
U.S. No. 2 S.R.W.		151.00	4.11	+2.00		160.50
U.S. No. 3 H.A.D.....		169.50	4.61	+3.50		191.00
Canadian No. 1 A: Durum...	N.Q.	--	--	--		206.00
Feed grains:						
U.S. No. 3 Yellow Corn....		118.00	3.00	+1.50		134.25
Soybeans and meal:						
U.S. No. 2 Yellow.....		217.50	5.92	+4.20		254.05
Brazil 47/48% SoyaPellets		196.00	--	+1.00		185.00
U.S. 44% Soybean Meal....		179.00	--	+1.00		168.00
U.S. FARM PRICES 3/						
Wheat.....		116.10	3.16	+1.10		127.12
Barley.....		65.22	1.42	--		82.21
Corn.....		91.34	2.32	+1.18		102.36
Sorghum.....		72.09	3.27 2/	+.44		88.18
Broilers.....		1219.14	--	+37.48		1183.43
EC IMPORT LEVIES						
Wheat 5/.....		104.25	2.84	-1.65		49.55
Barley.....		104.65	2.28	-1.55		57.65
Corn.....		93.55	2.37	+6.60		54.25
Sorghum.....		95.50	2.42	-4.00		66.65
Broilers 4/ 6/ 8/.....		233.00	--	+41.00		167.00
EC INTERVENTION PRICES 7/						
Common wheat(feed quality)		159.65	4.34	+.35		145.80
Bread wheat (min. quality)		170.25	4.63	+.25		155.50
Barley and all						
other feed grains.....		159.65	--	+.35		145.80
Broilers 4/ 6/.....		1237.00	--	+7.00		1117.00
EC EXPORT RESTITUTIONS (subsidies)						
Wheat		64.15	1.74	-1.40		11.45
Barley.....		71.40	1.55	+1.20		26.70
Broilers 4/ 6/ 8/.....		151.00	--	-2.00		98.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ September shipment. N.A.=None authorized. N.Q.=Not quoted. Note: Basis December delivery.

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